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NPSP: Change the Primary Contact for a Household

The Primary Contact field specifies the primary point of contact for Household Accounts.

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- Change the Primary Contact for a Household
- If you don't see the Primary Contact field on your Household Account page layout . . .
- If you don't see the Primary Contact field on your Manage Households page . . .

The Primary Contact field is available for the Household Account model in NPSP version 3.0 and later. When you create a new Contact and Household, Salesforce automatically specifies that first Contact as the Household's Primary Contact. You can change this Contact at any time by editing the Household Account record.

Considerations:

- Field-level security, profile settings, and other configuration options will affect the visibility of this field.
- By default NPSP also considers the Primary Contact as the primary donor for all household-level donations.
- The field is also available for Organization Accounts.

Change the Primary Contact for a Household

1. In the Nonprofit Success Pack, click the Accounts tab and open the Household Account whose Primary Contact you want to change. (You can also simply search for the Household Account in the Salesforce search field, and then click the Account Name to open the Household Account record.)
2. In the Account Detail section, click **Edit**.
3. On the Manage Households page, scroll down to the Account Details section, enter (or look up) the name of your Primary Contact, and click Save.

If you don't see the Primary Contact field on your Household Account page layout . . .

If you don't see the Primary Contact field available on your Household Account page layout, you likely upgraded to NPSP version 3.0 or later (rather than installed it from scratch). If that's you, then you'll need to manually add the Primary Contact field to the Household Account page layout.

1. In Salesforce Setup, click **Customize | Accounts | Page Layouts**.
2. Click **Edit** next to the Household Layout.
3. In the Household Layout section at the top of the page, make sure the Fields category is selected, and then drag the Primary Contact field into your page layout. (We recommend dragging it into the first section of Account Details.)
4. Click Save.

If you don't see the Primary Contact field on your Manage Households page . . .

If you don't see the Primary Contact field available when you try to make an edit to the Manage Households page, you likely upgraded to NPSP version 3.0 or later (rather than installed it from scratch). If that's you, then you'll need to manually add the Primary Contact field to the Manage Household Custom field set.

1. In Salesforce Setup, click **Build | Customize | Accounts | Field Sets**.
2. Click **Edit** next to the Manage Household Custom field set.
3. In the Manage Household Custom section at the top of the page, click the Primary Contact field and drag it into the **In the Field Set** box below.
4. Click Save.



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